



Avoiding Campaign Calamities

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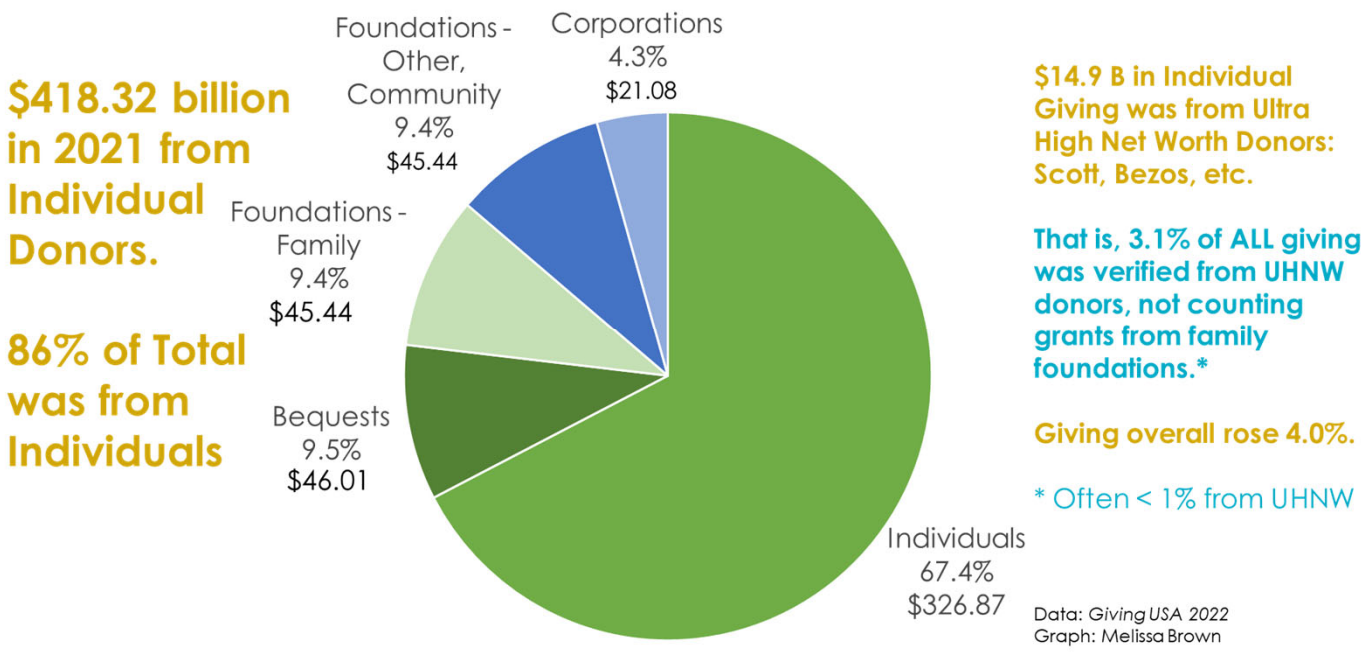
Agenda

- 2023 campaign marketplace
- *5 campaign essentials*
- Campaign calamities
- Campaign best practices
- Campaign tips
- Q & A





Who is giving?





Distribution of giving

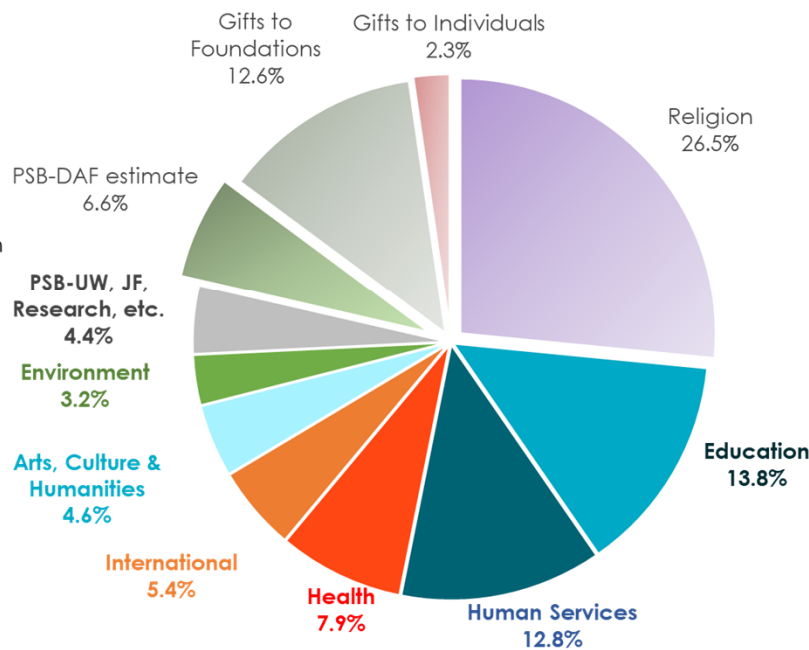
PSB = Public Society Benefit* contains

DAFs – estimate from Melissa Brown based on National Philanthropic Trust annual report on DAFs

Aggregate giving such as United Way, Jewish Federations

Social science and scientific research institutes

Data: Giving USA 2022
Graph by Melissa Brown



Lighter fill indicates NOT available for our partners, typically:

Religion 26.5%
Gifts to Foundations 12.6%
Gifts to Individuals 2.3%

Debate: DAF estimate* 6.6%
48.0%

*20%+ of this comes back but is unreported as a transfer from one charity to another, similar to UW and JF allocations

*National Taxonomy of Exempt Entities at Candid.org shows subsector definitions.



Philanthropy in 2023

- Donors view their gifts as investments
- Investments are made to causes, not institutions
- Fewer gifts being made, but more money being raised today
- Three ways to raise more money
 - Acquire more donors
 - Improve donor retention
 - Upgrade current donors





Charity vs. Philanthropy

Charity (giving)



Philanthropy (investing)

Problem

About money

Short-term crisis

Organizational needs

Impulsive giving

Short-lived satisfaction

Solution

About mission

Long-term vision

Community needs

Thoughtful investment

Satisfying outcome



Campaign landscape

- Most campaigns range between \$5 - \$20 million
- Comprehensive campaigns
 - Annual giving as part of the campaign
 - Will often enhance your annual giving program (post-campaign)
 - Endowment included with capital initiatives
 - “Total resource” giving opportunities
 - Post-COVID backlog
 - More campaign activity





5 campaign essentials

1. **Leadership**
2. Compelling, emotional and urgent case for support
3. Adequate internal resources
4. A great plan
5. Access to needed dollars





Leadership calamities

- The invisible Board
 - Who owns the campaign?
- Enlisting campaign leaders too early
 - Leaders will become obvious during pre-campaign stages
 - **Involvement** invites **investment**
- The “Hired Gun”
 - Leverage your best volunteer champions to solicit, not staff or an outsider
- Soliciting your Board too soon





Leadership – what’s needed?

- The campaign belongs to your Board
- An engaged CEO
 - Strong partnership with Board Chair and campaign leaders
- Solicit the Board first, but...
 - In the appropriate sequence and for the right amount, and let them experience the process
- Who are your champions?
 - Leadership emerges throughout the campaign; enlist your champions





Case for support calamities

- Thinking small; test your BIG VISION
- Focusing on your organization instead of your community
- No connection to your strategic plan
- All facts and figures, no emotion
- Waiting for the perfect campaign materials
 - Brochures don't raise money





Case for support – what do donors need?

- To know they are needed
- To understand the value proposition
- To make a difference through their support
- To join and be joined by others
- To feel good about their investment
- To trust the source: volunteers and your organization





Adequate internal resource calamities

- Not investing in the campaign
 - It costs \$.05 to \$.13 to raise a dollar
- No approved campaign budget
- No existing donor systems
- Lack of internal systems, policies and procedures
- No professional support or guidance





Adequate internal resources – what's needed?

- Donor database
- Wealth screening solution
- Gift acceptance policies and procedures
- Campaign tracking program
- Separate account for campaign gifts
- Staff with campaign experience
- Support of key senior staff to support donor cultivation





Great plan calamities

- Announcing the goal before you've won the campaign on paper
 - You can always share the total "need" but avoid the word "goal"
- Lack of pre-campaign planning
 - Be effective first, efficient second





A great campaign plan – what’s needed?

- Planning
 - If you fail to plan...plan to fail
- Reasonable timeline
- Proper campaign structure
- Volunteer leaders
 - Increase the size of your team
 - Provide access and influence among peers
 - Serve as your storytellers





Access to contributable dollars calamities

- Money chasers
- The sneak attack





Access to contributable dollars – what’s needed?

- A major gifts culture
- Past campaign success
- Planned giving program or legacy society
- Two or three key champions who are willing to consider lead gifts
- A mature annual giving program





Campaign best practices

Are you ready to campaign?





Role of Board and volunteers

- Make a timely and proportionate gift
- Master your own campaign story
- Be able to articulate campaign outcomes
- Willingness to be solicited in person
- Cultivate, solicit and steward donors
- Be flexible and open-minded
- Enjoy the journey!





Role of the CEO

- Make a timely and proportionate gift
- Articulate your BIG BOLD VISION
- Cultivate, solicit and steward
- Serve as the campaign spokesperson
- Encourage and educate your Board
- Ensure resources for the campaign
- Partner with the Board and Director of Development





Role of the development team

- Make known the resources you need
- Know your donor base
- Assign a campaign coordinator
- Develop a campaign culture
- Cultivate, solicit and steward
- Position your volunteers for success
- Gently support and counsel volunteers for their respective roles





Role of campaign counsel

- Evaluate internal and external readiness
- Develop a campaign plan
- Provide volunteer and staff training
- Monitor and track campaign progress
- Advise on key campaign and donor strategies
- Support volunteers and staff on various campaign activities





Campaign tips

- Maximize board gifts
- Those who don't make aspirational gifts can't lead
- Share your own "campaign story" with the Board and be sure they develop their own
- Develop flexible and customizable campaign materials
- Video assets bring emotion!





Campaign tips

- Go public after all top prospects have been solicited, not based on a percentage of goal
- Listen to your donors
- Find out who views your organization as a “top 3” philanthropic priority





Campaign tips

- Your campaign goal will be determined by the total contributions from your top 10 donors
- The amount of time it takes to secure your top 10 gifts will determine how long your campaign takes





Where does fundraising occur?





Thank you!

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